Business Intelligence Grievance Reports via BEx

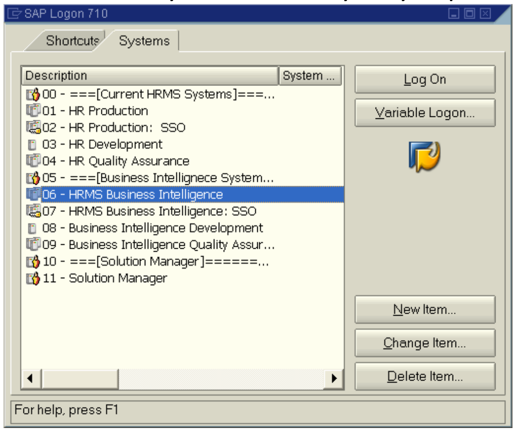
Purpose	Use BEx reports to easily obtain grievance data based on specific reporting needs and selection criteria. Agencies and the Labor Relations Division of OFM use reports to prepare to report to the Governor's Office for GMAP, identify areas for improvement and to facilitate collective bargaining. Reports vary from showing all detail for each grievance to summary counts. This document is an overview of how to run grievance reports via BEx. For several reports due to size, consider exporting the report to Excel to better organize data as desired.
Trigger	Unique requests for data on grievance counts or activity, the need to audit data entries, GMAP preparations.
Prerequisites	You have grievance data entered into HCM and within six months of receiving system access you have successfully participated in Grievance Tracking training, and you are a designated as a BI PowerUser.
End User Roles	In order to perform this transaction you must be assigned the following role with reporting access: Decentralized Grievance Administrator Decentralized Grievance Inquirer

Change History	
Date	**Change Description**
July 25, 2012	Created.

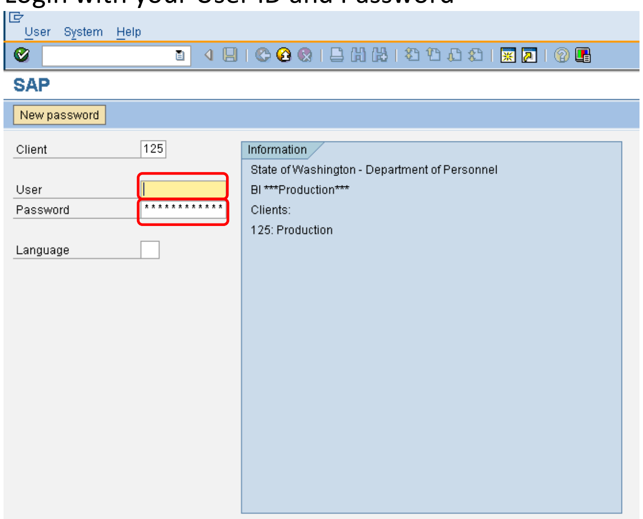
Menu Path	HRMS Business Intelligence via SAP Logon Pad → BEx Analyzer → Human Resources → Grievance → *Select report
Transaction Code	Varies
Helpful Hints	For detailed information about a specific report, please see the instructions for BI grievance reporting via the portal. For information about the purpose of a specific report, please see the Grievance Report Job Aid. Both filters on "Close Date" must be applied every time a grievance report is run in BI. The "Greater Than or Equal To" date will change because the date is based on the start date used in the "Report Date Range", but the "#" sign entry remains the same. Apply both "Close Date" filters in order to view accurate data. Further instructions on BI Report features are available under BI Training materials, including the "BW/BI Grievance InfoCube" Self-Paced Learning Materials.

Procedure

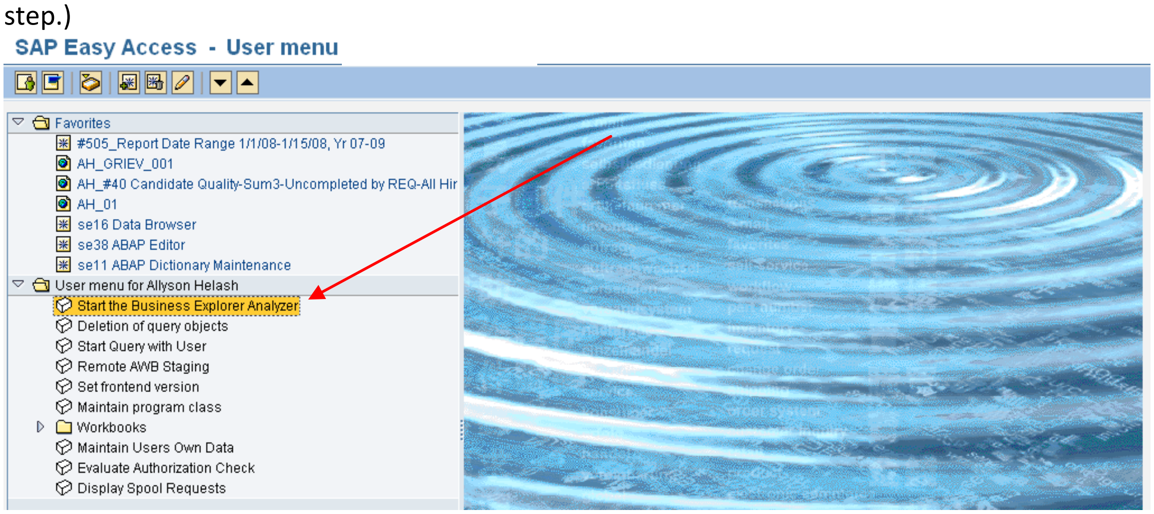
1. Login using the SAP Login icon, for BIP, select “HRMS Business Intelligence” (the number of selections on your menu may vary depending on your security profile).



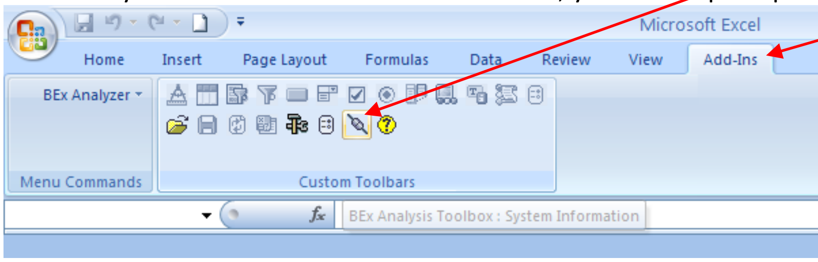
2. Login with your User ID and Password



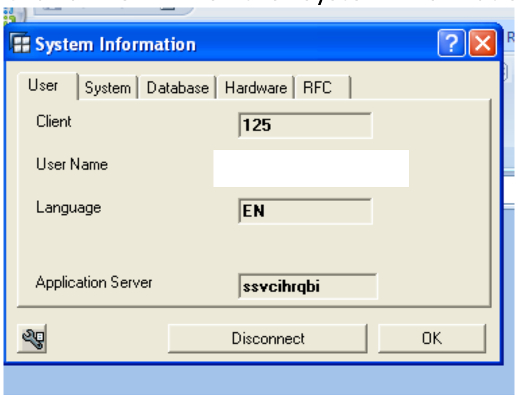
3. Select “Start the Business Explorer Analyzer” by double-clicking. This should open Excel. (Note: it is best to have all Excel sessions closed before this step.)



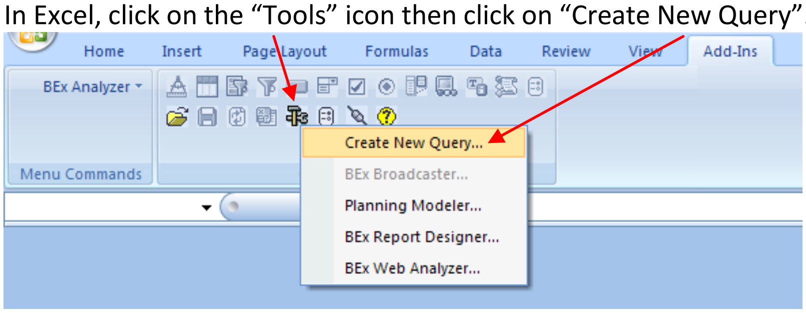
4. At the top of the Excel screen, the “Add-Ins” tab should appear after a short delay. Wait until the connector icon changes from “unconnected”  to “connected”  and click on it, as shown below. If you don’t wait until it is “connected”, you will be prompted to logon to BI again.



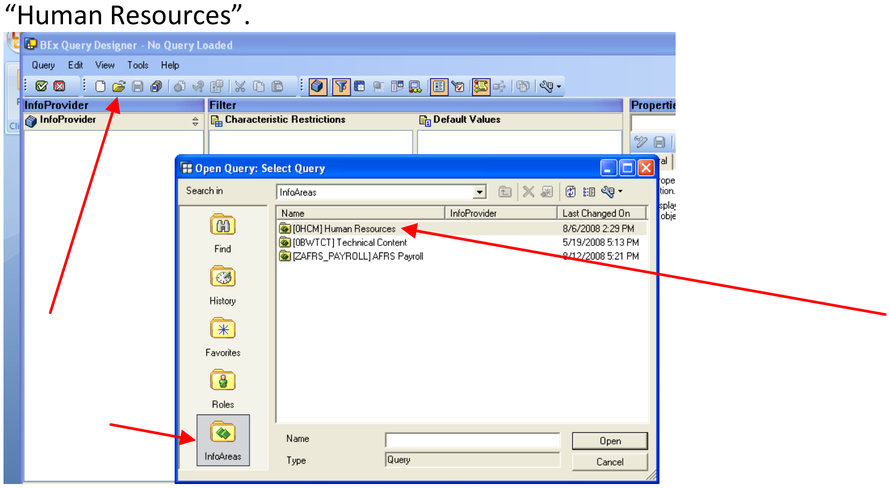
5. Click on “OK” when the “System Information” window appears.



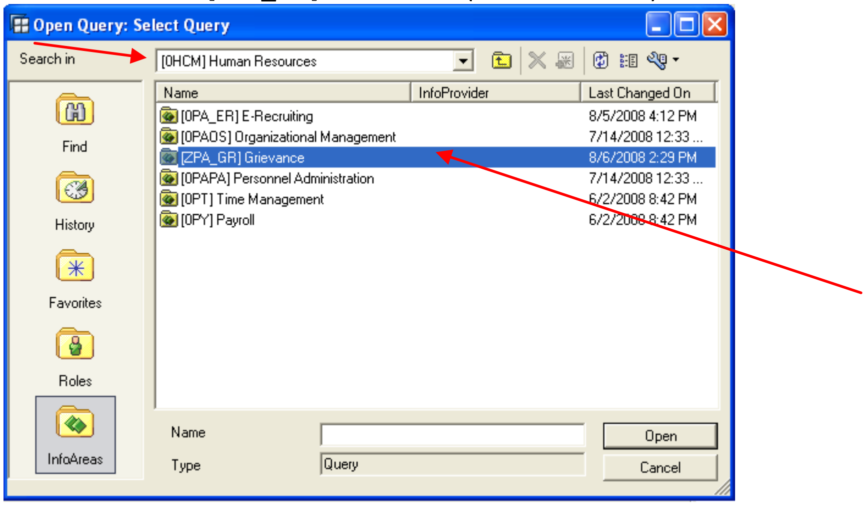
6. In Excel, click on the “Tools” icon then click on “Create New Query”.



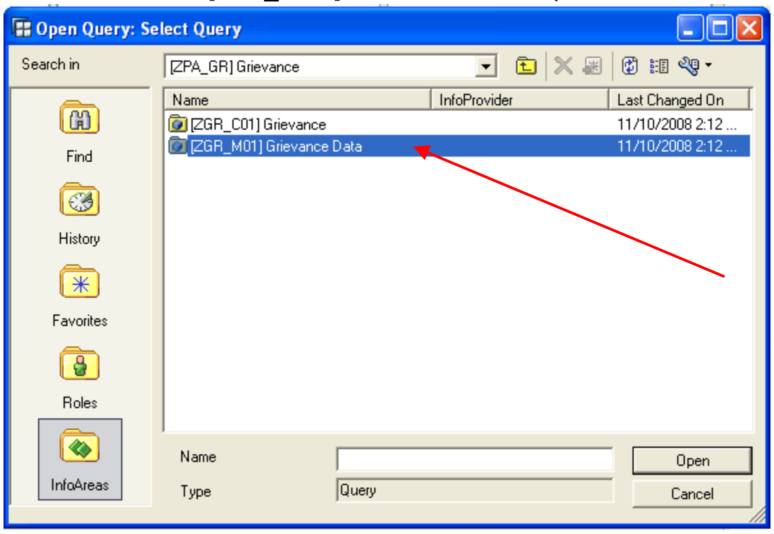
7. The BEX Query Designer window will open. Click on the “Open Query” icon, click on “Info Areas” in the new window and double-click on “[OHCM] Human Resources”. Your screen may just say “Human Resources”.



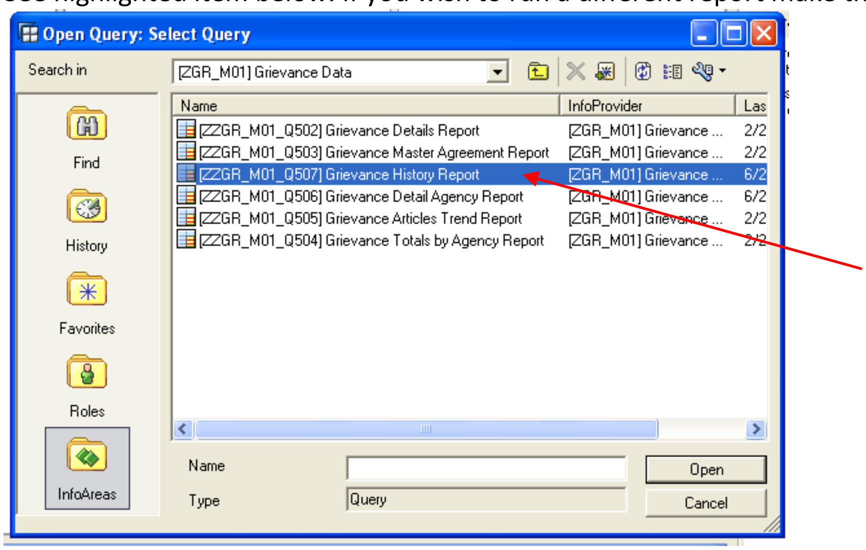
8. Double-click on “[ZPA_GR] Grievance” (or “Grievance”):



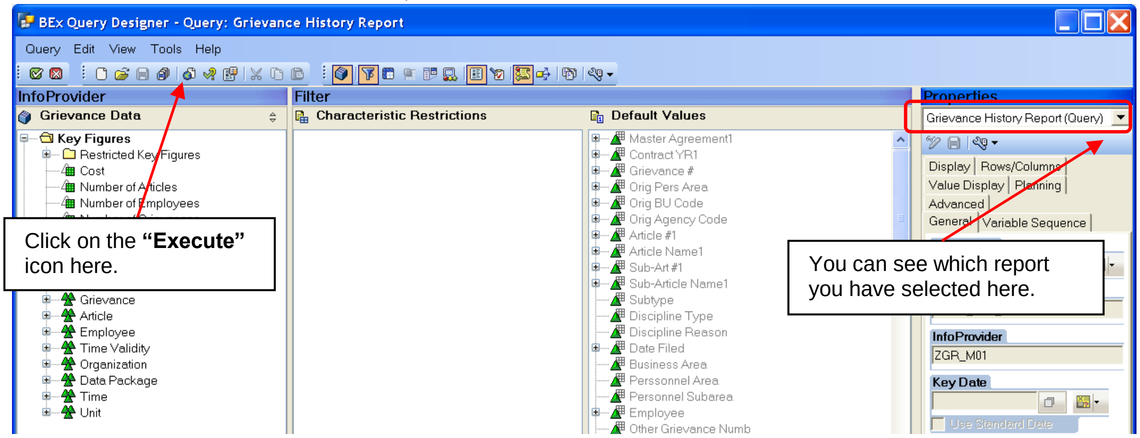
9. Double-click on “[ZGR_M01] Grievance Data” (or “Grievance Data”):



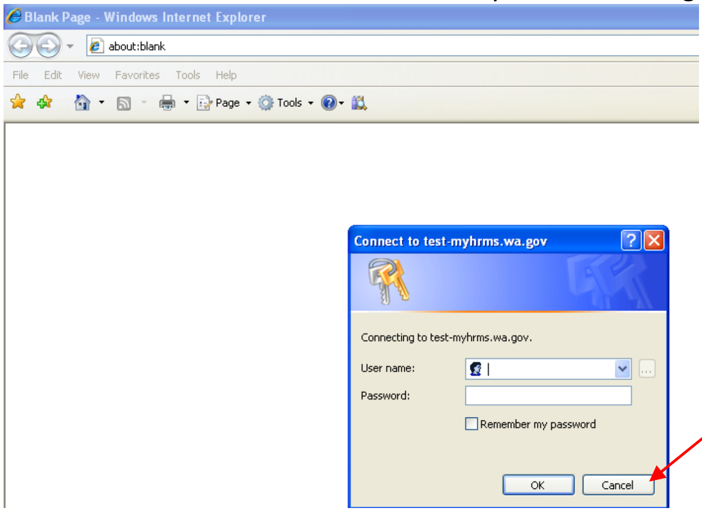
10. Double-click on “[ZZGR_M01_Q507] Grievance History Report” (or “Grievance History Report”). See highlighted item below. If you wish to run a different report make that selection here.



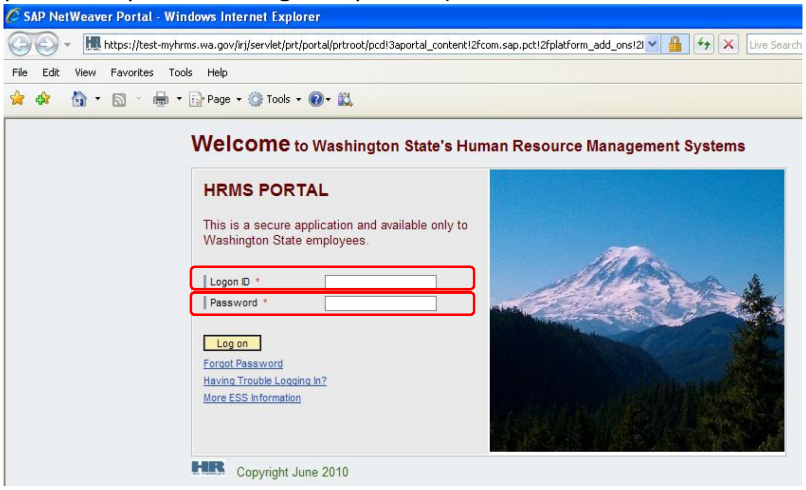
11. The next screen will look like this, click on the “Execute” icon:



12. If you don’t see the screen below, skip to Step 13. If you do see this screen, DO NOT login here; instead click on the “Cancel” button and you will be brought to the next screen.

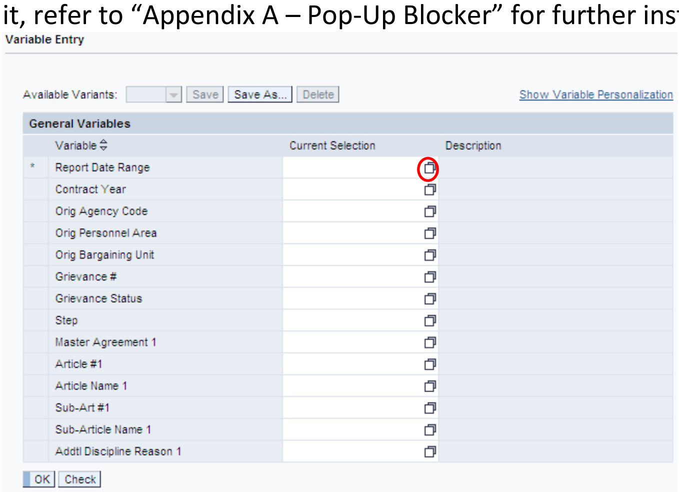


13. This screen is the Portal Logon screen. If you have Single Sign On (SSO), you will not see this screen and will go directly to the screen in Step 14. Otherwise, logon here using your Email address as Logon ID (for example, John.Doe@des.wa.gov) and your Network password (the password you use to log into your PC).

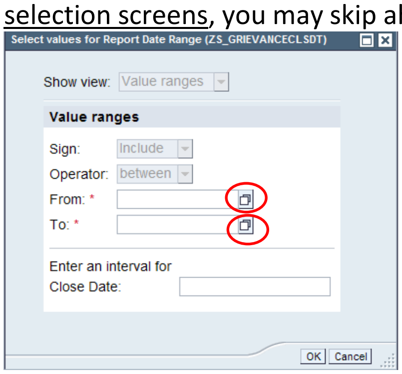


14. The BEX WEB page with the report's user selection screen will now appear:

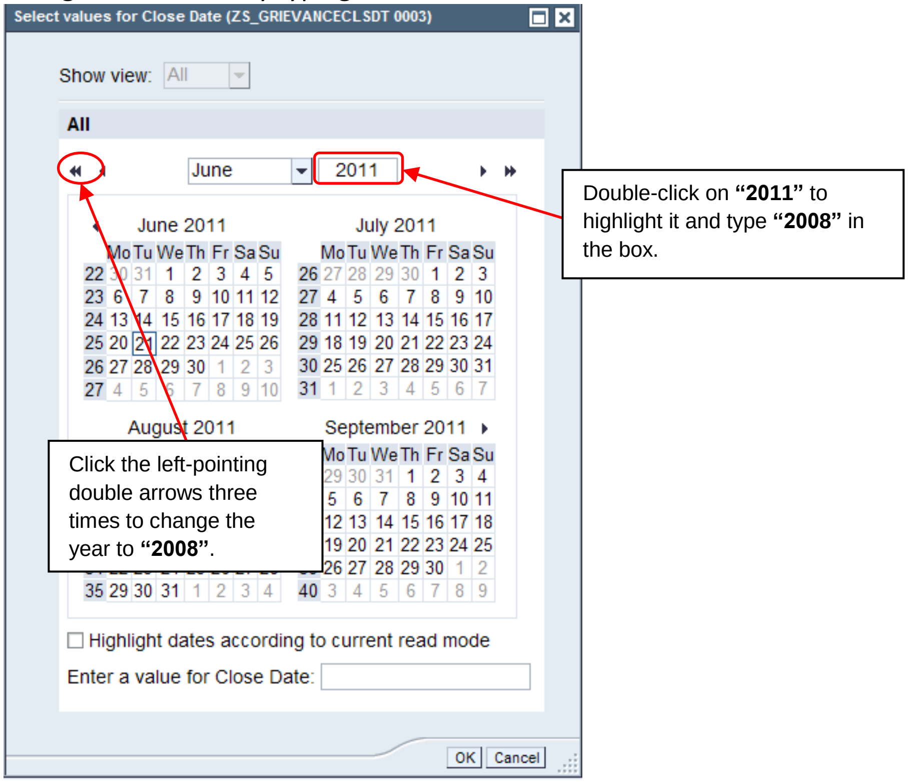
15. Only the "Report Date Range" field requires an entry; other fields are optional. Enter a valid date range to restrict the report results to a specific time period (for example, 1/1/2008-1/15/2008). The date range can be typed in directly, or a selection menu can be used by clicking on the square at the right of the field. If the pop-up selection menu does not appear when you click on it, refer to "Appendix A – Pop-Up Blocker" for further instructions.



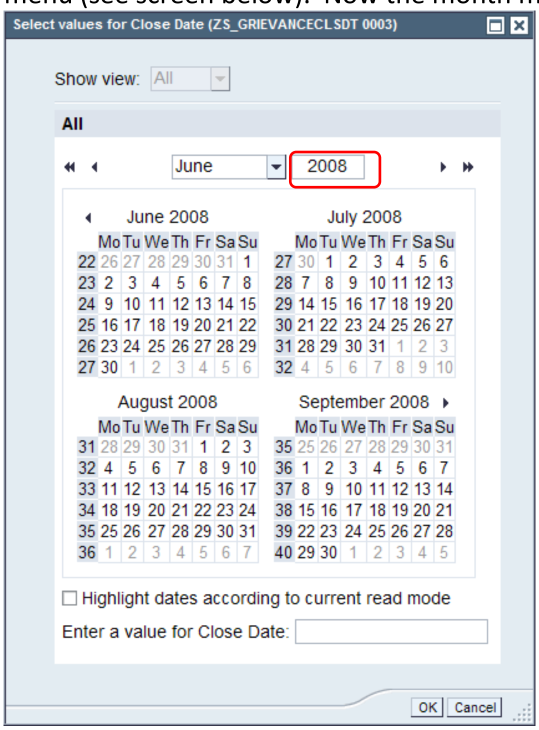
16. The selection screen below appears for entering each date of the date range. The "From" and "To" dates may also be typed in here directly, or a calendar selection screen may be used by clicking on the square on the right side of each field. (Date formatting may vary from MM/DD/YYYY, DD.MM.YYYY, YYYY.MM.DD, etc.) You may want to use the calendar selection process the first time to ensure use of the correct format. If you are NOT using the calendar selection screens, you may skip ahead to Step 22.



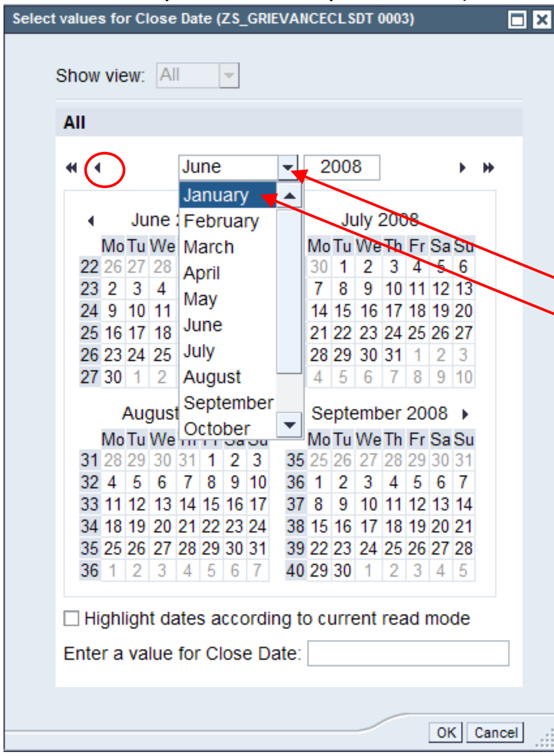
17. When using the calendar popup menu to select the date, the menu below will appear with today's date selected. You may click on the <u>double arrows</u> pointing left to <u>decrease one year at a time</u>. To change the date faster, double-click on "2011" in the box in the example below. Now change it to "2008" by typing.



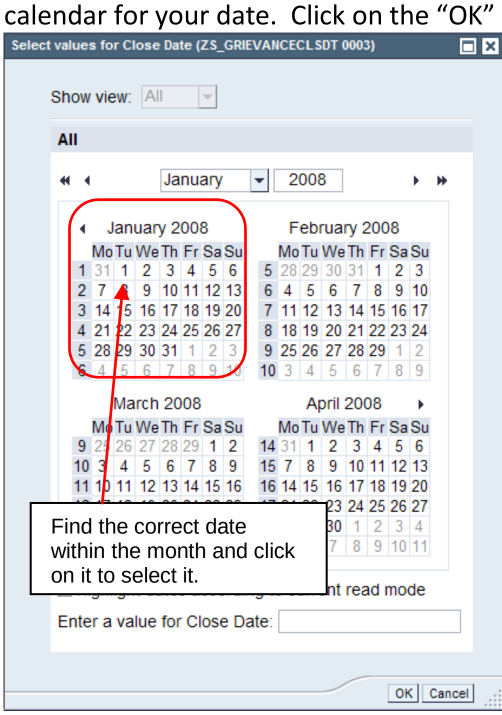
18. No matter which method is used, "2008" should now appear as the year in the calendar popup menu (see screen below). Now the month may be changed.

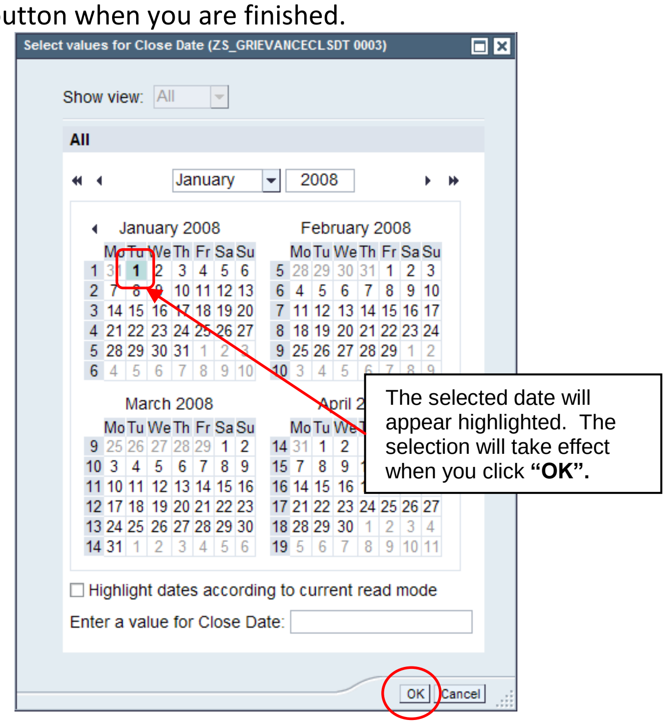


19. The month may also be changed by two methods. You may click on the single arrows pointing left to decrease one month at a time. To change the month faster, click on the dropdown menu and select the month directly (in this example, since we are working on the "From" date, you want "January" for "January 01, 2008").

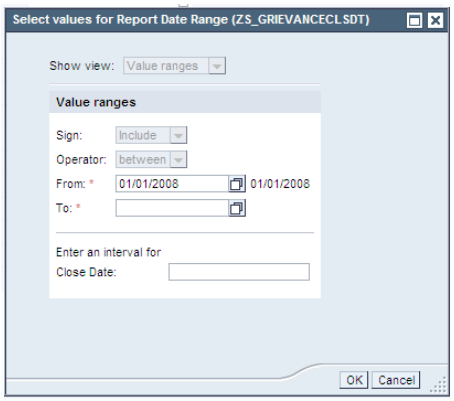


20. Once the Month and Year have been selected, simply click on the correct number on the calendar for your date. Click on the "OK" button when you are finished.

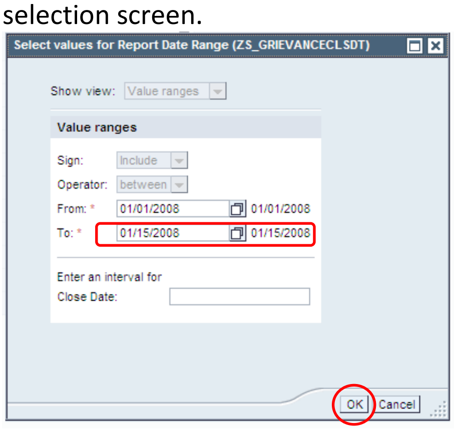




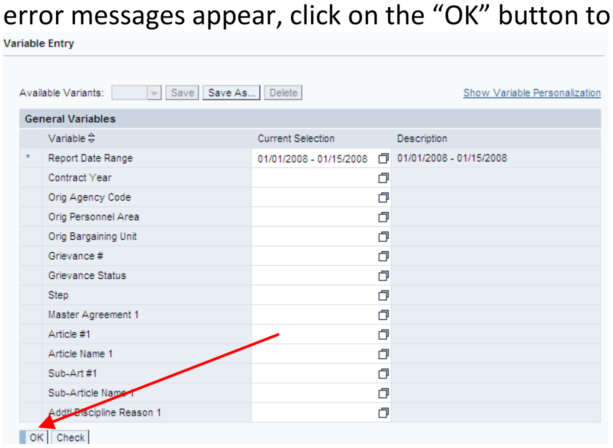
21. After clicking on the "OK" button in the previous step, the calendar popup menu has been replaced by the Value ranges "From" "To" date menu. The entry you selected for the "From" date is now entered in the field.



22. Either repeat the process to enter a date in the "To" field, or type the date in directly. The completed screen will look like the one below. (Note: the date to the right of each field only appears after the date is selected by calendar menu, or the 'Enter' key is pressed after each date is typed into the field. Its purpose is to validate that the date has been entered in the proper format. If a date does not appear to the right after pressing the 'Enter' key, <u>then the date is improperly formatted</u>.) When you are finished, click on the "OK" button to return to the main selection screen.

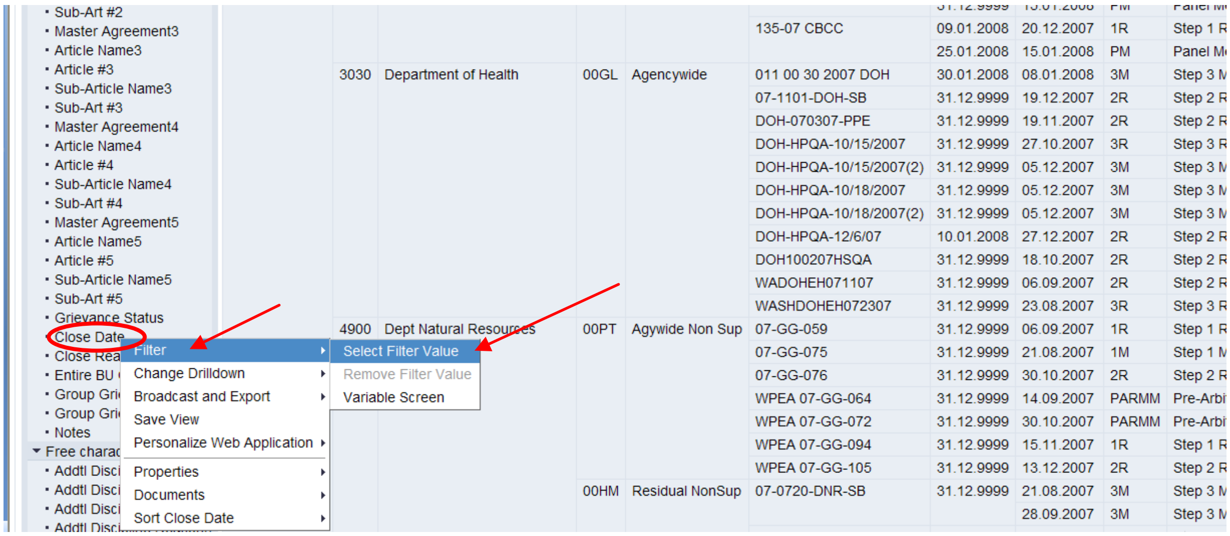


23. After the date range is entered, you can click on the "Check" button to verify that all entries on this selection screen are in the correct format. The dates will appear in text to the right of the entry field (see screen print below). If they are incorrect, an error message will appear. If no error messages appear, click on the "OK" button to run the report.

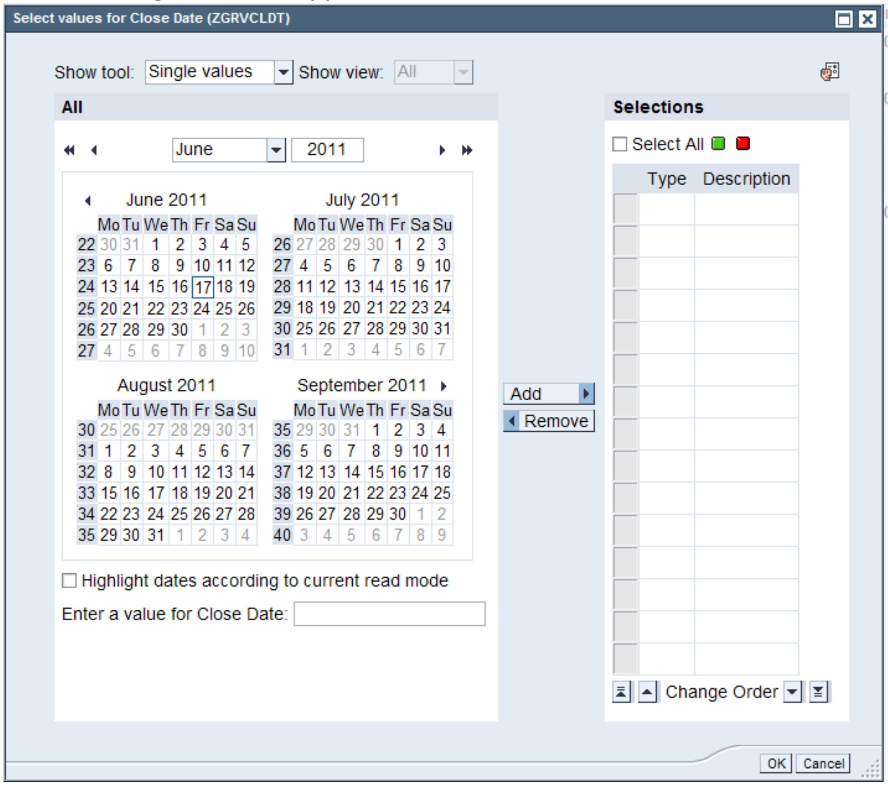


24. Report results will appear like the ones below. These results will not be correct, however, until the correct "Closed Date" filters are applied. <u>Applying these filters on the "Close Date" is required each time the report is run in order for the report to be accurate.</u>

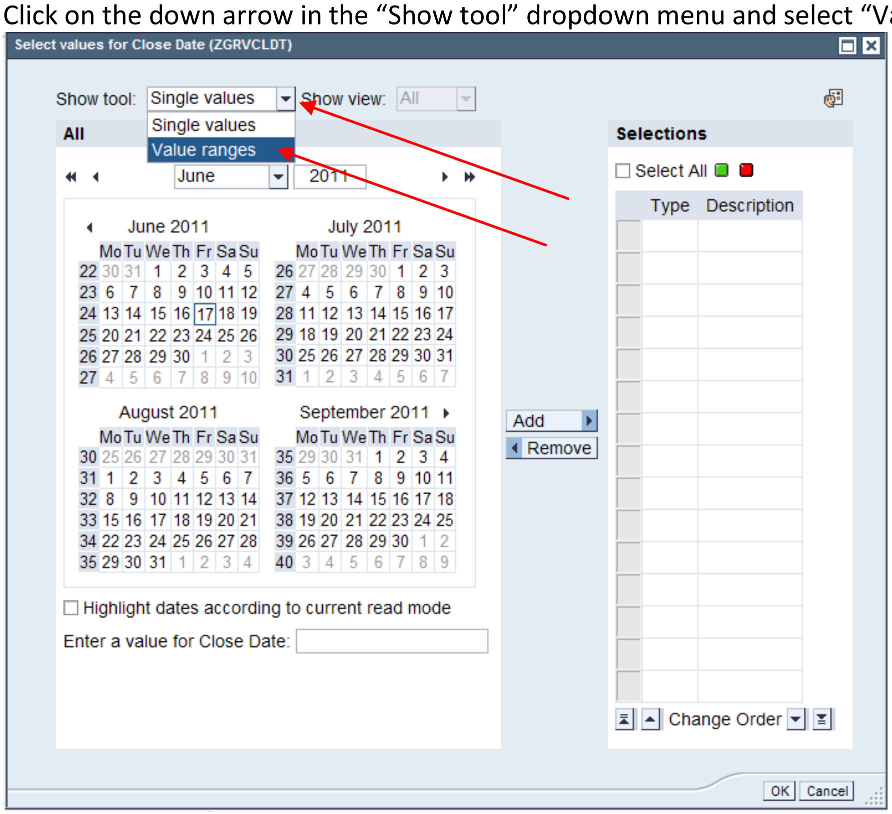
25. To apply the two required "Close Date" filters, go down the left side of the screen and right-click on "Close Date" after the report results appear. Select "Filter" and "Select Filter Value", as seen below.



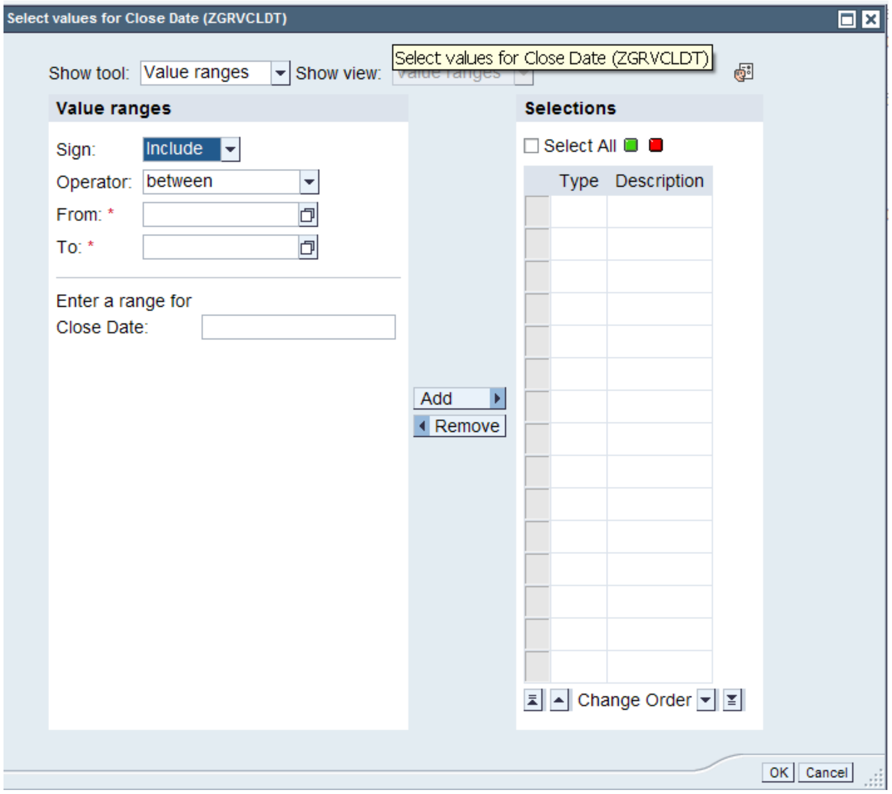
26. The following menu will appear.



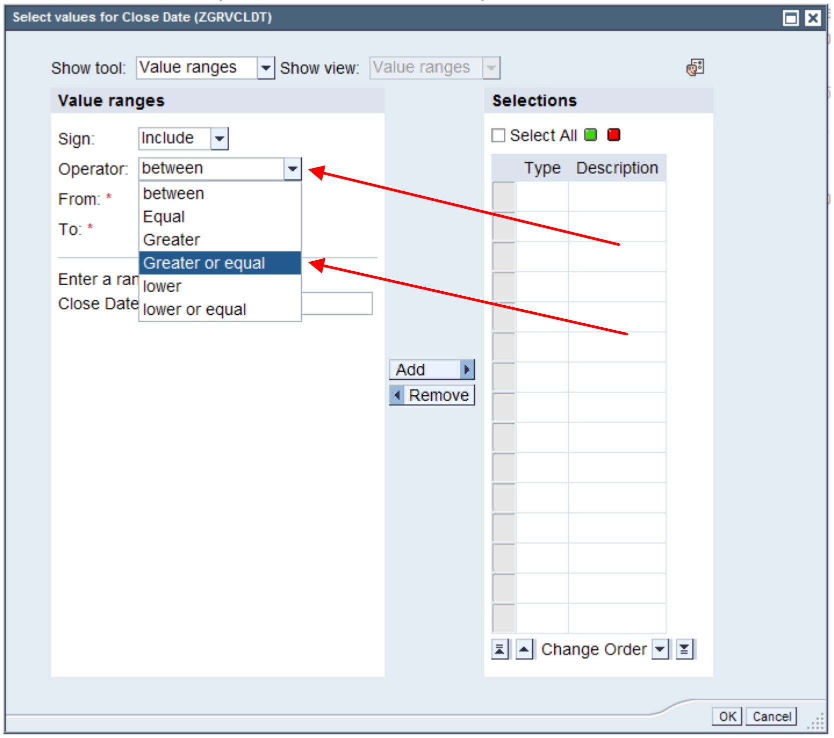
27. Click on the down arrow in the “Show tool” dropdown menu and select “Value ranges”.



28. The “Value ranges” menu appears (see screen print below).

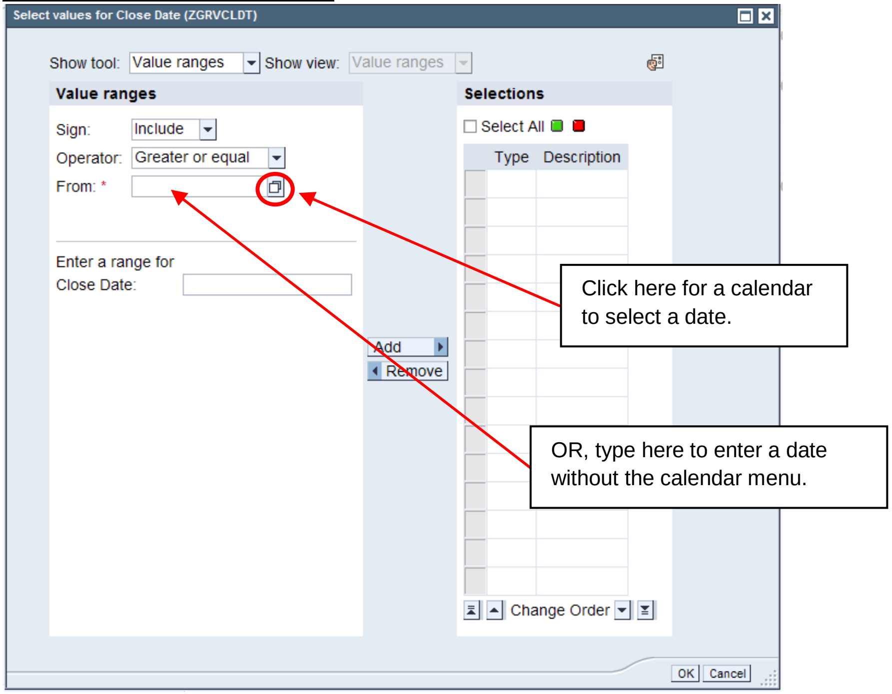


29. In the “Operator” dropdown box that is displaying “between”, click on the down arrow. Click on the “Greater or equal” choice in the dropdown menu.

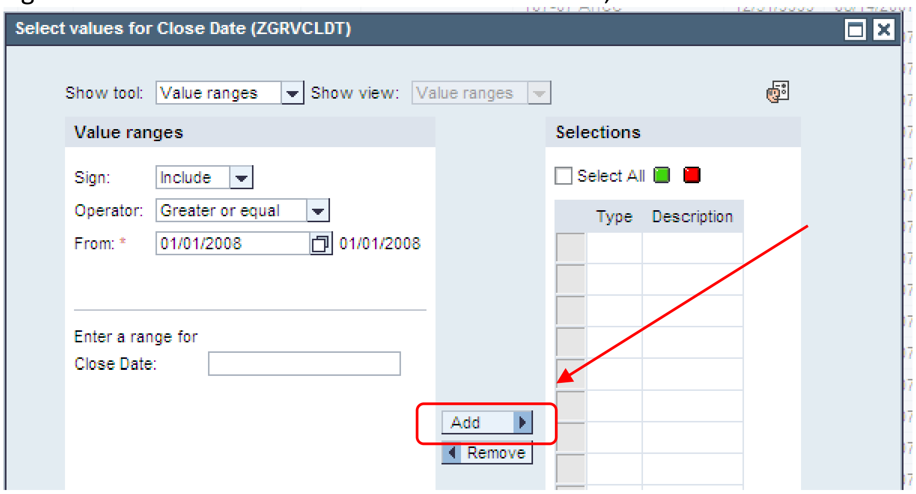


30. Enter the <u>same date</u> you entered into the "From" field of the first Selection Screen for "Report Date Range" into the "From" field on the "Value ranges" screen here. If you know the correct format for entering dates (i.e. MM/DD/YYYY, or DD/MM/YYYY, etc.), then you can type the date into the box <u>below</u> "Greater or equal". If you would rather select the date from a calendar popup, then click on the square to the right of the box and refer to Steps 17 – 20 for using the calendar menu. See Appendix C – Change Date Format if you have trouble viewing or entering date ranges into the selection screens.

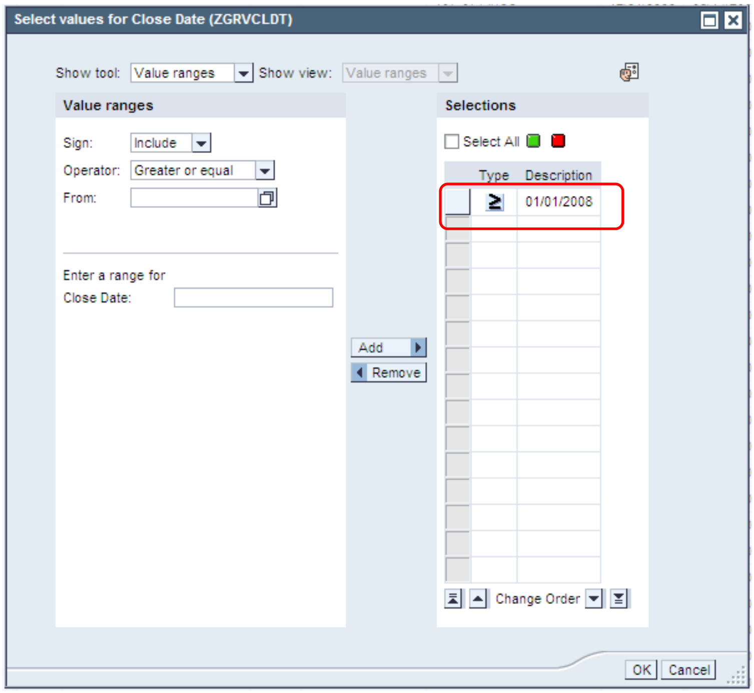
    For example, in Step 15, a "Report Date Range" of 01/01/2008 – 01/15/2008 was entered. Therefore, the Starting Date of the range is 01/01/2008. That means we want this "Closed Date" filter to <u>give us all grievances in the specified time period with Closed Dates Greater Than or Equal To</u> 01/01/2008 in the report results. <u>Nothing with a Closed Date before 01/01/2008 should appear in this report</u>.



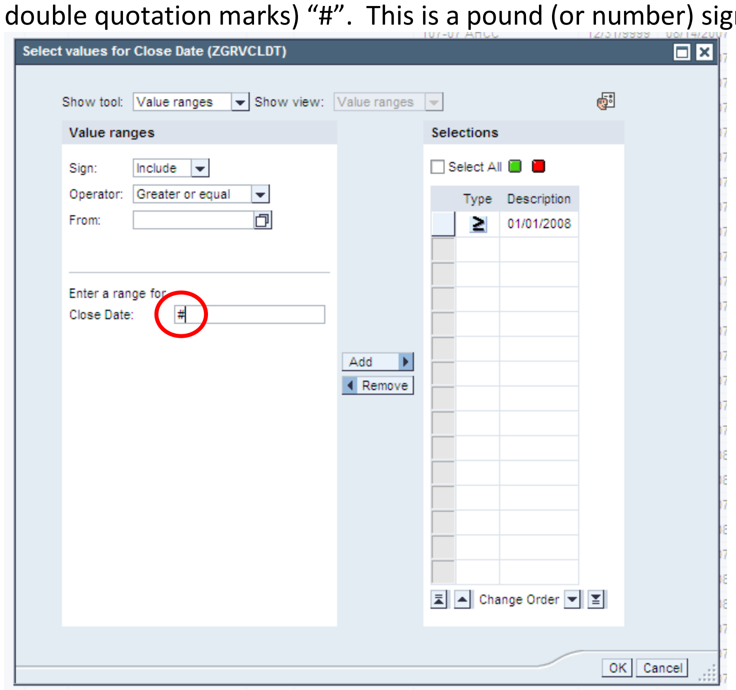
31. After the date is entered, you will need to move this selection to the "Selections" listing on the right side of the screen. Click on the "Add" button, below.



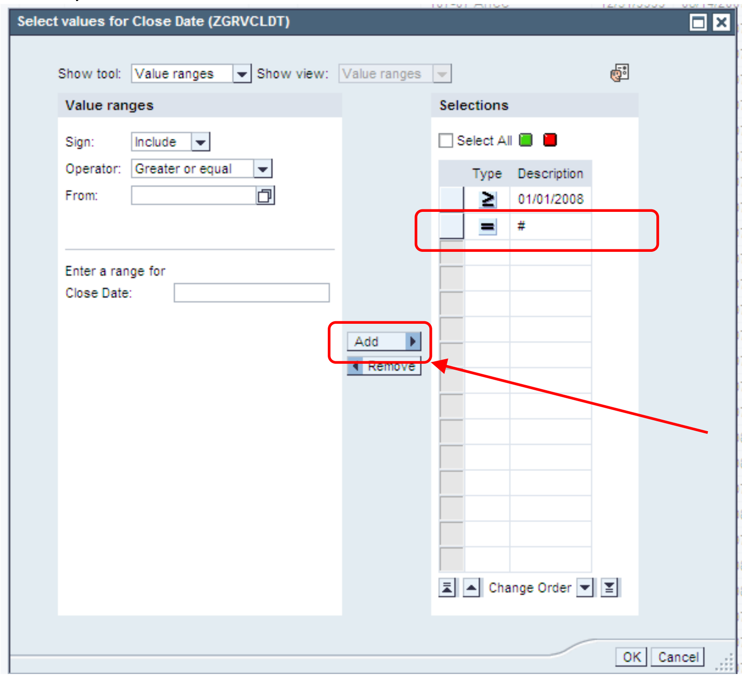
32. Your screen should now look like the one below with Closed Date ≥ 01/01/2008 in the "Selections" window. For the "Closed Date" to be properly filtered, however, we have to add one more filter to it.



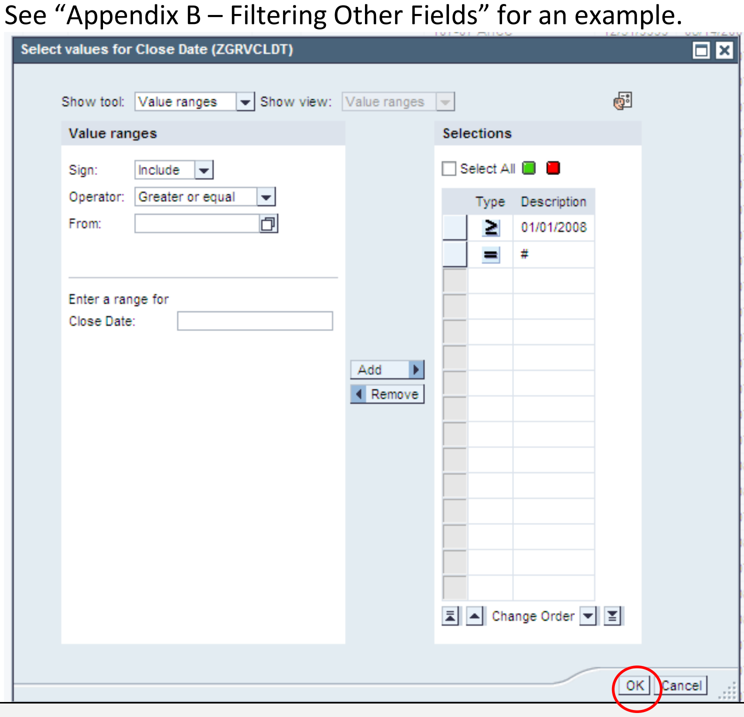
33. In the "Enter a range for Close Date:" direct input box, a value is needed <u>which will include all records in the selected date range which do not have a "Closed Date"</u> (i.e. something which will include all records with a blank "Closed Date" field). {Note: - Since this report includes <u>more than just the most recent step</u> in a grievance, the results will be slightly different than in the other reports.} Therefore, we need to enter the following character into the box (without the double quotation marks) "#". This is a pound (or number) sign (see screen print below).



34. Once you have entered this, click on the “Add” button to move it into the “Selections” listing on the right. It should appear with an equals sign in front of it in the right window (see screen print below).

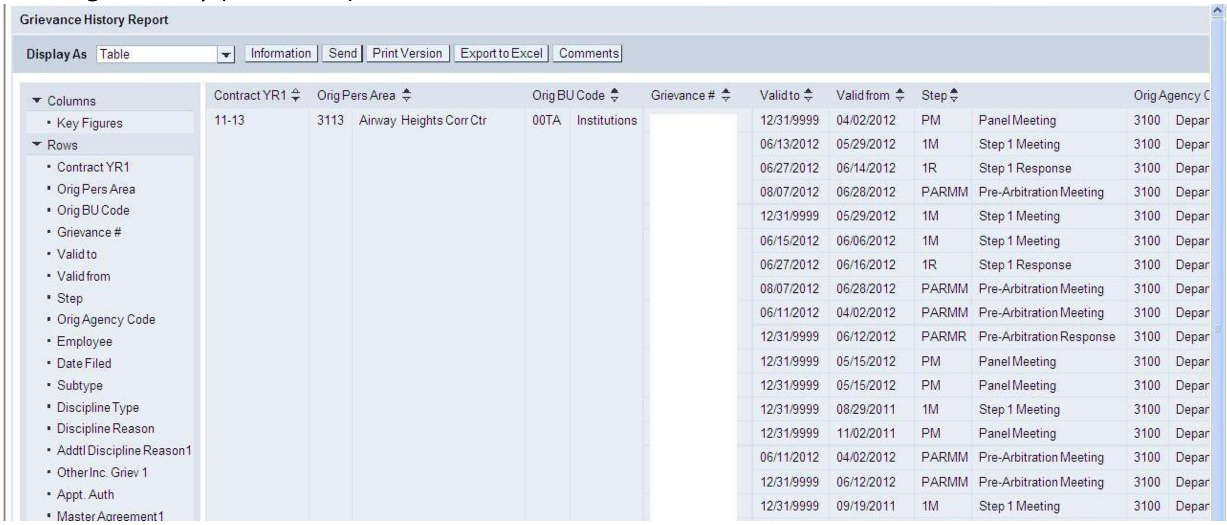


35. This completes the settings for the 2 “Close Date” filters. To accept these settings, click on the “OK” button (see screen below). This will return you to the report with the output filtered accordingly. At this point, filters may be applied to other fields as desired. To apply filters for other fields, repeat the procedure for applying the “Closed Date” filters using the desired field(s). See “Appendix B – Filtering Other Fields” for an example.



Results

The Grievance Details Report should refresh on your screen with less data than before. Scroll all the way to the right of the report. You will now be able to see that the "Closed Date" filters you just applied are working correctly (see below).

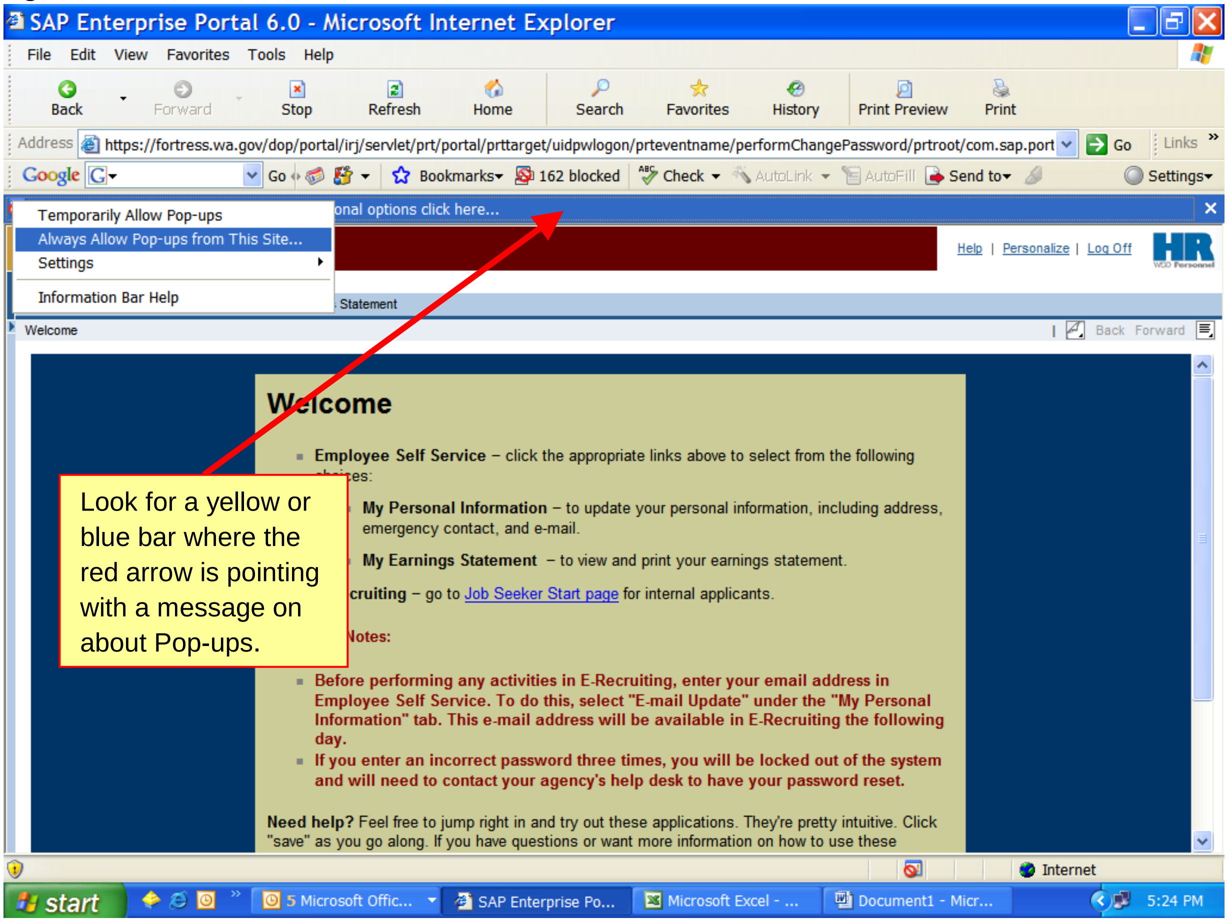


Appendix A – Pop-Up Blocker

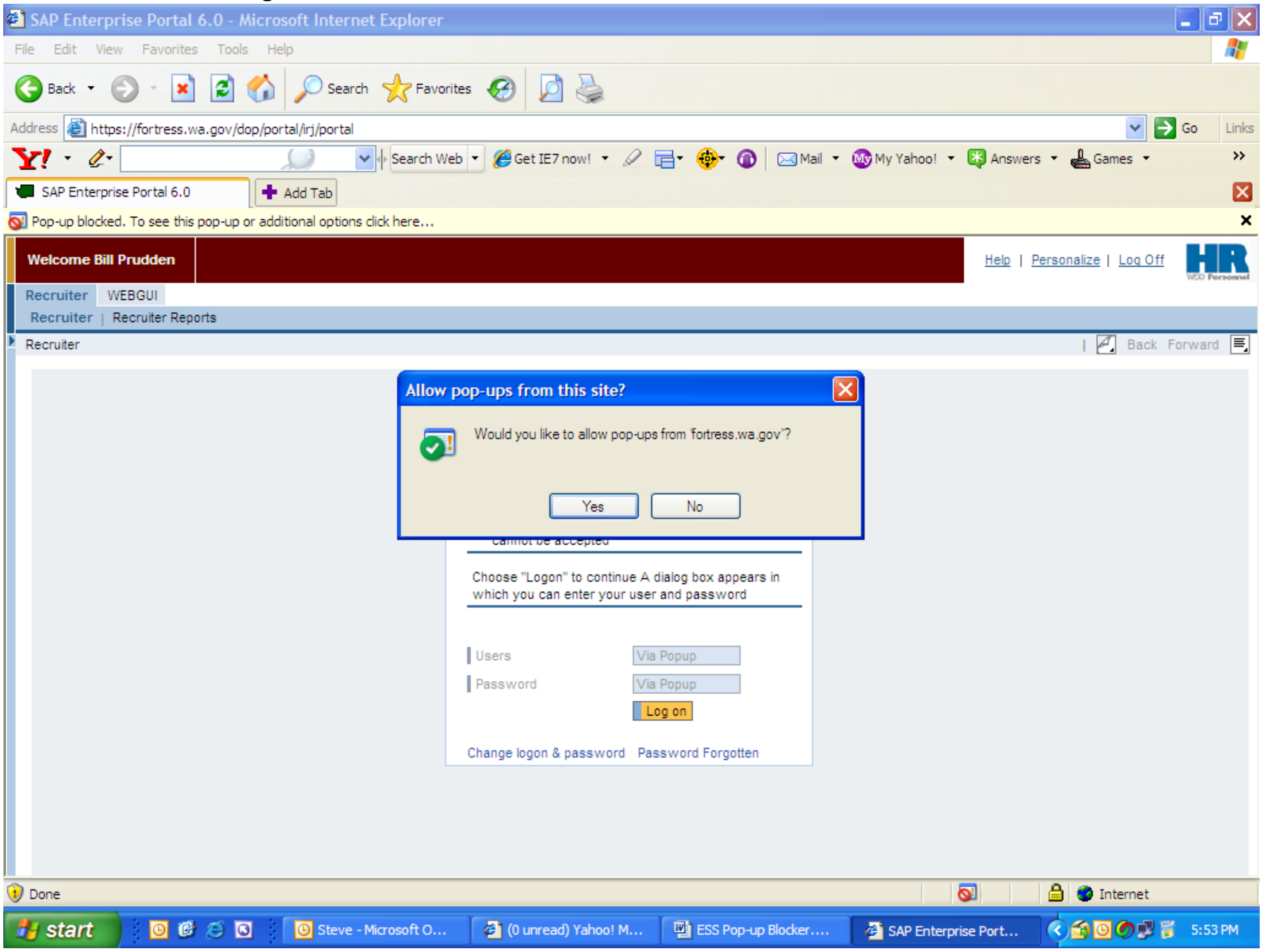
If a pop-up menu fails to appear when you click on it, it may be due to your Pop-Up Blocker settings. Check the top of the screen for a yellow or blue line (as seen in Figures 1 and 2 below) with a message similar to, "Pop-up blocked. To see this pop-up or additional options click here…" (Note: these are not the exact screens you will see. They are only being used to illustrate the Pop-up Blocker feature. The messages you receive may also vary slightly depending on which browser and version you are using.)

Click on the line (as seen in BLUE in Figure 1) and a menu will appear. Select "Always Allow Pop-ups from This Site…" from the menu.

Figure 1.



After selecting “Always Allow Pop-ups from This Site…” a pop-up will ask you, “Would you like to allow pop-ups from” with the website name (see Figure 2, below). Answer “Yes” and pop-ups from this website will no longer be blocked.

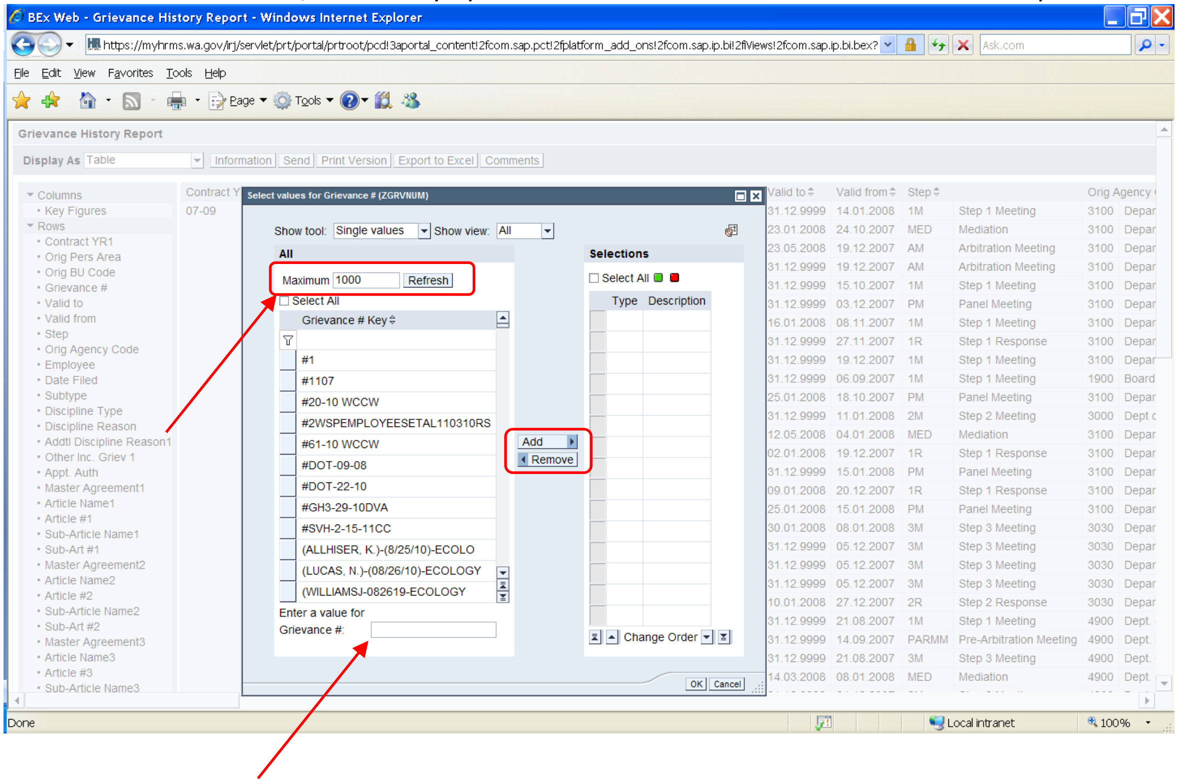


You should now be able to see your pop-up menus.

Appendix B – Filtering Other Fields

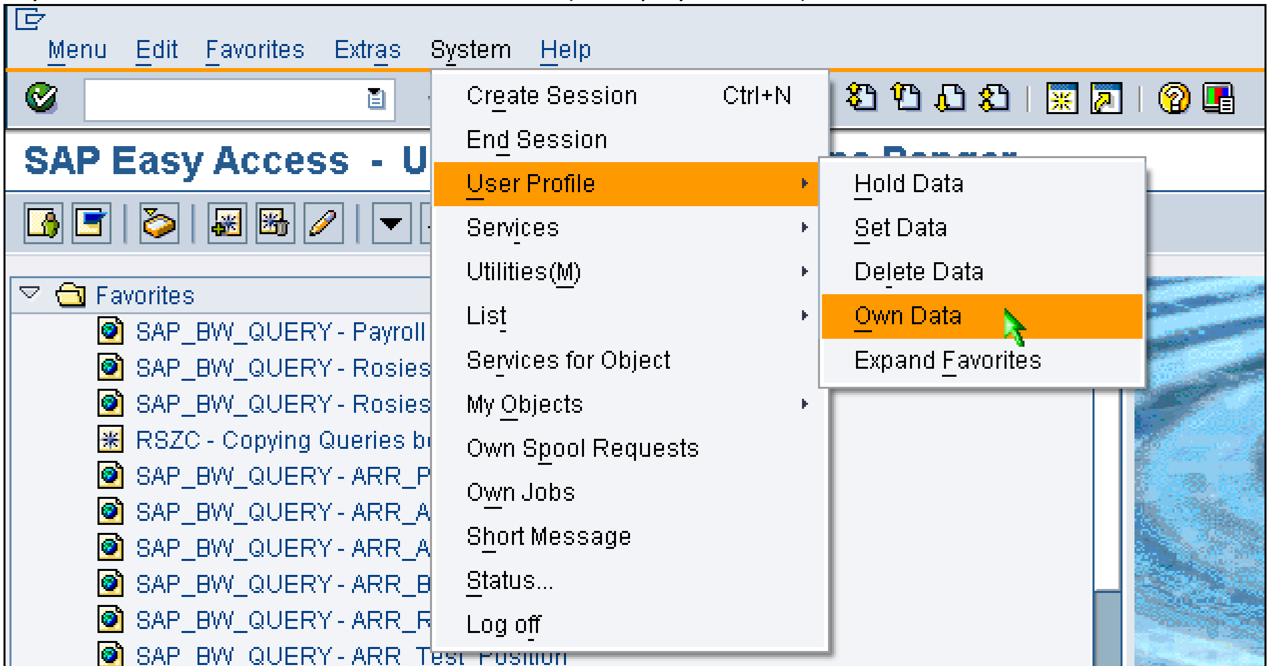
Other filters are optional and can be applied in a similar fashion. The only difference is the type of data they hold. For example, right-clicking on "Grievance #" and clicking "Filter" and "Select Filter" (as described above for "Closed Date") allows you to select (or filter) which grievances you wish to view by Grievance #. The list of all Grievance Numbers in the report (or 1000, whichever is smaller) is returned as selections on the left side of the screen (see screen below). By clicking on the selections you want and clicking on the "Add" button, the selected Grievance Numbers will move to the "Selections" listing. There is also a "Select All" check box which can be used if it would be easy to deselect the items you don't want to view.

The default for maximum amount of selections listed on the left side of the screen is 1000. If this is not sufficient, the number can be changed and the "Refresh" button can be used to increase the number of selections, all the way up to the number of selections returned in the report.



Appendix C – Change Date Format

You can determine how the date is formatted by going from your SAP Easy Access Menu to "System" then "User Profile" then "Own Data" (as displayed below).



Next click "Defaults" and select the date format you wish to use. Click the "Save" button to retain your new settings.